North Carolina COVID-19 Vaccine Management System

Provider Enrollment Portal Organization Administrator User Guide

Version 4

January 13, 2021







If you have any questions, issues or requests, please go to the CVMS Help Desk Portal* at

https://ncgov.servicenowservices.com/csm_vaccine

Providers that are first time users of the CVMS Help Desk Portal will have to follow the steps below:

- 1. Register for an account on the portal by clicking 'Register' in the top right-hand corner
- 2. Populate your first name, last name, business e-mail, and your registration code NOTE: The registration code is your Provider PIN (i.e., NCA650001), which can be found on the packing lists received with your Vaccines For Children shipments, or in the top right-hand corner of a wasted / expired report generated from the North Carolina Immunization Registry (please add "NCA" to the front of the six-digit PIN#)

 For providers who are not enrolled or may not have a Provider PIN, you may use the following generic Provider PIN to
- 3. You will receive an e-mail with your username and temporary password to log into the portal



register: VAC2021

^{*} On the home page of the CVMS Help Desk Portal, select the "Vaccine Provider" option to submit your question, issue, or request.

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Overview

Section A

Welcome to the NCDHHS Provider Enrollment Portal in the COVID-19 Vaccine Management System (CVMS). Please read the following instructions before enrolling your organization.

As an Organization Administrator, you are about to complete Section A of the CDC COVID-19 Vaccination Program Provider Agreement and CDC Supplemental COVID-19 Vaccine Redistribution Agreement (if applicable), which gathers information on your organization. To complete this section, you will be asked for:

- Organization details
- Organization Administrator contact details
- Location(s) administering vaccinations
- Information about your Executive Officers (CMO and CEO)

You must add all locations within your organization that will administer the COVID-19 vaccine. Each location is represented by a Vaccine Coordinator. The Vaccine Coordinator will enter location-specific details when completing Section B of the agreement.

If you also serve as the Vaccine Coordinator for a location within your organization, click on '<u>Locations</u>' at the top of menu bar after you have completed Section A.

If you also serve your organization as its CEO and/or CMO, click on the "CEO Review/Sign" and/or "CMO Review/Sign" at the top menu bar after you have completed Section A to review the conditions for enrollment and provide your signature.

Please note, although you have access to both the CEO and CMO review and signature pages, this section is designated only for the CEO and CMO of your organization. The CEO and CMO will be

Don't Show this Again

Close

In this user guide, we will discuss how to complete Section A of the CVMS Provider Enrollment Process.

The content included in this user guide is for the following role: **Organization Administrator**

Additionally, you will need to:

- Use the latest version of Chrome, Firefox, or Safari
- Log into the CVMS Provider Enrollment Portal (link to the portal included in the email inviting you to register)

Now, let's get started!

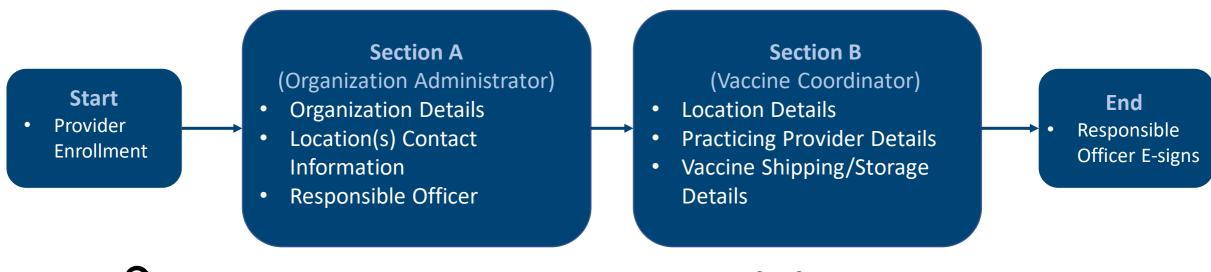


Provider Enrollment Process Overview



CVMS Provider Enrollment Process Overview

The COVID-19 Vaccination Program Provider Enrollment Process takes place in the **CVMS PROVIDER ENROLLMENT PORTAL**. The CVMS Provider Enrollment Portal is a cloud-based solution.



- - Additional Resources
- Provider Enrollment Portal (link to the portal included in the email inviting you to register)
- Provider Enrollment Checklist -

https://immunize.nc.gov/providers/covid-19training.htm



Relevant Roles

- Organization Administrator
- Vaccine Coordinator
- Responsible Officer (CEO and CMO)



Provider Enrollment Roles

A provider is anyone who provides and administers healthcare services.



- **Pharmacies**
- Community health centers
- Hospitals
- Clinics
- Long-term care facilities
- Acute care hospitals
- Urgent care clinics
- Other medical care facilities



Completes Section A for the entire organization.

- Completes Section B for their assigned location(s)
- On-site at the location

Chief Executive Officer (CEO)

Reviews and signs on behalf of all locations within the organization

Chief Medical Officer (CMO)

Reviews and signs on behalf of all locations within the organization



Provider Enrollment Role Checklist

COMPLETE THE CHECKLIST below for EACH ROLE that you serve in your organization

Organization Administrator

- Register for a Provider Enrollment account
- Mark if your organization is a Redistribution Participant
- ☐ Add all locations
- Add your organization's **CEO**
- ☐ Add your organization's **CMO**

Vaccine Coordinator

- Register for a Provider Enrollment account via the link in the welcome email
- ☐ Upload pictures of the interior and exterior of your storage units
- ☐ Input all practicing providers at your location

For locations with at least 25 practicing providers:

- Request & return the Provider
 Bulk Upload Template to the https://ncgov.servicenowservices.com/csm_vaccine (Ref. slide 2)
- Review and sign the CDC COVID-19 Vaccination Program Provider Agreement
- Review and sign the Storage and Handling Attestation

Chief Executive Officer (CEO)

- Register for a Provider Enrollment account via the link in the welcome email
- Review and sign the CDCCOVID-19 VaccinationProgram Provider Agreement
- If applicable, review and sign the CDC Supplemental
 COVID-19 Vaccine
 Redistribution Agreement

Chief Medical Officer (CMO)

- Register for a Provider
 Enrollment account via the link in the welcome email
- ☐ Review and sign the CDCCOVID-19 VaccinationProgram Provider Agreement
- If applicable, review and sign the CDC Supplemental COVID-19 Vaccine Redistribution Agreement



Completing Section A



Provider Enrollment Workflow – Section A

2



Organization
Administrator logs in
to the CVMS
Provider Enrollment
Portal



Organization Administrator enters organization information



Organization Administrator adds location information



Organization
Administrator enters
CMO information on
the Responsible
Officer page*



Organization
Administrator fills in
CEO information on
the next Responsible
Officer page*

*It is possible to request CMO and CEO to add their signature here, but not recommended until the entire Part A and Part B sections are completed



Organization
Administrator can
modify submission
after agreement
approval by State

If approved or rejected, an email notification will be generated. Rejected statuses will generate an email with the Reason for Rejection. If not, check spam/junk folder for an email from COVIDenroll@dhhs.nc.gov

Audience

Organization Administrator

Vaccine Coordinator

CEO

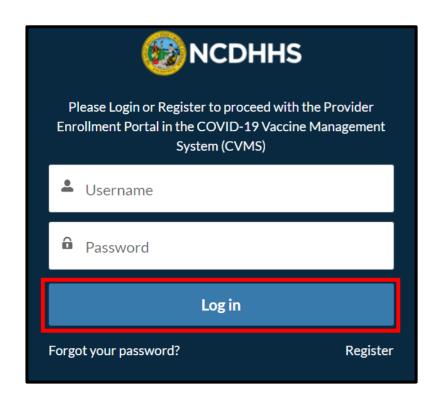
CMO

Time Estimate

<20 minutes to enter information</p>



Step 1 of 9: Log into the CVMS Provider Enrollment Portal



When you are ready to begin the Provider Enrollment process, navigate to the CVMS Provider Enrollment Portal.

- 1. Enter your **USERNAME**
- 2. Enter your **PASSWORD**
- 3. Click LOG IN
- 4. After clicking log in, you will be directed to **COMPLETE SECTION A**

Reference the CVMS Provider Enrollment Account
Registration and Password Reset User Guide for more
information about account creation, which is available on
the NC Immunization Branch website at
https://immunize.nc.gov/providers/covid-19training.htm

Audience

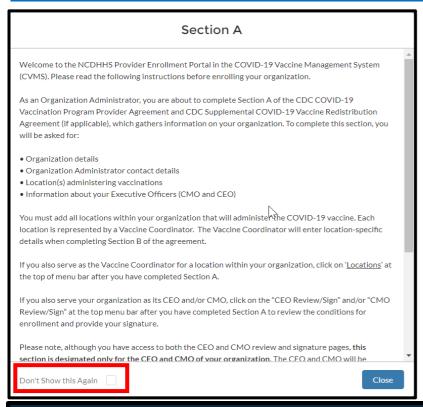
Organization Administrator

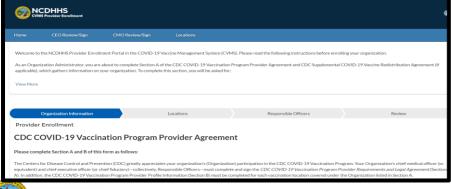
Tips

Link to the portal included in the email inviting you to register.



Step 2 of 9: Collect Key Details Before Beginning Section A



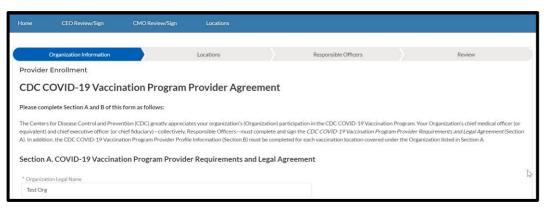


After logging in, you will see a message reminding you of the details you will need to complete **SECTION A**:

- Organization Details
- Organization Administrator Contact Details
- Location(s) administering vaccination
- Information about your Executive Officers (CEO / CMO)
- 1. COLLECT THESE DETAILS beforehand
- 2. CLOSE the window
- 3. You will be directed to Section A.

Audience

Step 3 of 9: Enter Your Organization Details





Once you begin Section A, you will be prompted to enter your **organization details** and indicate if your **organization is a redistribution participant**.

- 1. Populate ALL REQUIRED ORGANIZATION

 DETAILS
- If your organization is a redistribution participant, select YES next to REDISTRIBUTION
 PARTICIPANT
- 3. If you select Yes, your CEO and CMO will be required to SIGN AN ADDITIONAL AGREEMENT indicating that they have reviewed the submitted information and signed the redistribution agreement.
- 4. Review all details entered
- 5. Click **NEXT**

Audience

Organization Administrator

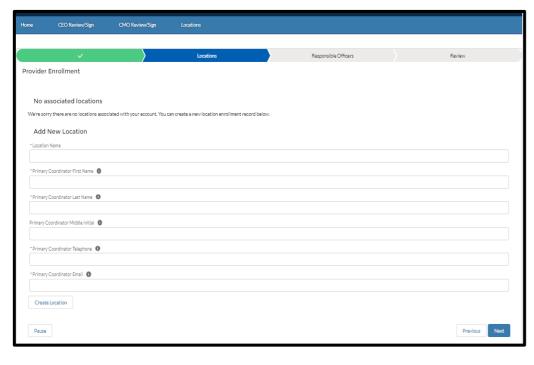
Tips

You can pause and save your progress at any point before submitting Section A.

If you pause, you must logout before logging in and continuing your session.



Step 4 of 9: Add Your Location(s) Details



After entering your organization's details, you will now be able to **ADD ONE OR MORE LOCATIONS** and their respective details.

On this page, you will see a list of **PENDING AND APPROVED LOCATIONS.**

- Complete the information for the FIRST LOCATION in the organization
- 2. Click **CREATE LOCATION**
- 3. You will see the location details appear in the list of **PENDING LOCATIONS**
- 4. Repeat this process for each location you wish to add
- 5. Click **NEXT**

Audience

Organization Administrator

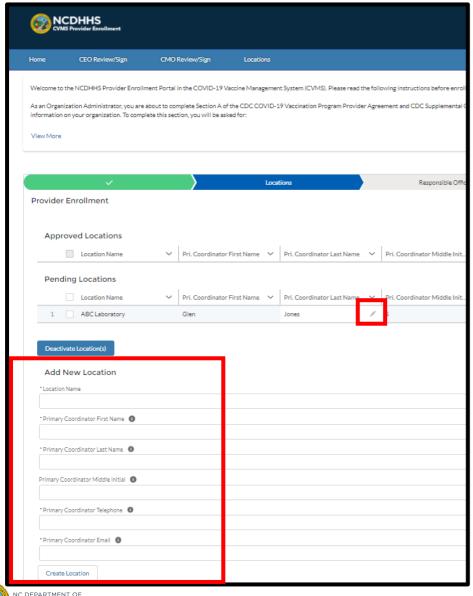
Tips

All locations within an organization must have the same CMO and CEO.

If a location has a different CMO or CEO, a unique Organization Administrator representing the organization will have to complete a separate Section A.



Step 5 of 9: Edit Your Location(s) Details



After adding a location, you are able to edit and update the information.

- 1. Locate the **LOCATION** you wish to edit
- 2. Click the **PENCIL ICON** next to the field you wish to update
- 3. Update the information
- 4. Review the information. Repeat for all details you wish to update.
- 5. Click **NEXT**

Audience

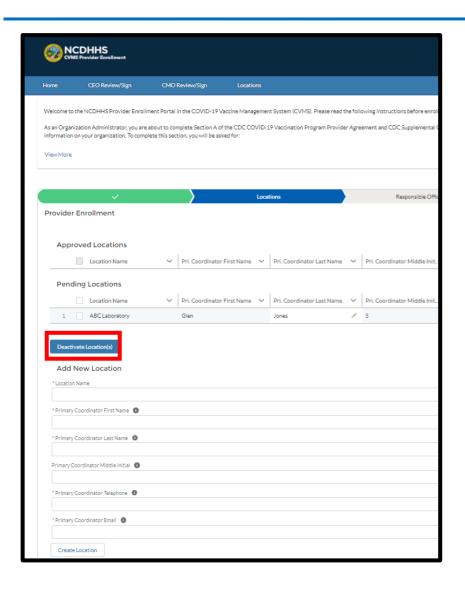
Organization Administrator

Tips

If you wish to manage
your location(s) details
after submitting Section A,
review the CVMS Provider
Enrollment Account
Maintenance User Guide.



Step 6 of 9: Deactivate Your Location(s)



After adding a location, you can deactivate location(s). If you wish you manage your location(s) details after submitting Section A, review the CVMS Provider Enrollment Location Management User Guide.

- 1. Locate the **LOCATION** you wish to deactivate
- 2. Select the **CHECKBOX** for one or more locations
- Review the locations you have selected to deactivate
- 4. Click the **DEACTIVATE LOCATION(S)** button
- 5. Click **NEXT**

Audience

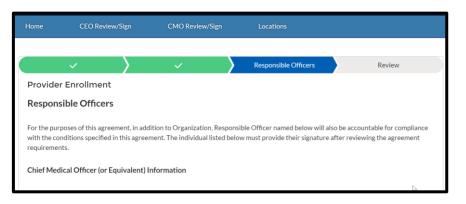
Organization Administrator

Tips

Click **Previous** if you need to go back and edit a location.



Step 7 of 9: Complete CMO Information



After adding your locations, you will enter your **CHIEF MEDICAL OFFICER** (CMO) Information on the Responsible

Officers page.

At the bottom, you will see the box **SEND REQUEST FOR SIGNATURE NOW** checkbox. This will immediately generate an email to the CMO requesting their review and approval.

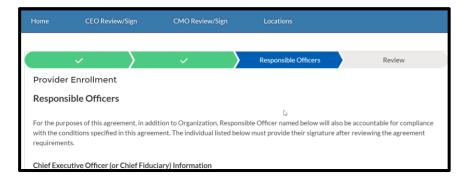
A and Section B are complete. If you do not select this checkbox, the CMO will receive an email once all Vaccine Coordinators submit the Section B flow for their location.

- 1. Enter ALL CMO DETAILS
- 2. Click **NEXT**

Audience



Step 8 of 9: Complete CEO Information



After entering the CMO details, you will be directed to enter your **CHIEF EXECUTIVE OFFICER** (CEO) Information on the Responsible Officers page.

You will see the same **SEND REQUEST FOR SIGNATURE** checkbox. This will immediately generate an email to the CEO requesting their approval and signature.

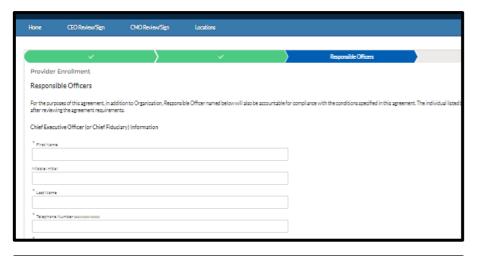
A and Section B are complete. If you do not select this checkbox, the CMO will receive an email once all Vaccine Coordinators submit the Section B flow for their location.

1. Enter ALL CEO DETAILS

Audience



Step 9 of 9: Complete Section A



Once all CEO details are entered, you are ready to **COMPLETE SECTION A**.

If you need to make any changes before completing Section

A, use the **PREVIOUS BUTTON** to go back and **MAKE UPDATES**.

Your Enrollment Status is: Submitted (Ready for Internal Review)

Your organization has been submitted to the NCDHH SProvider Enrollment Portal of the COVID-19 Vaccine Management System (CVMS). Once all locations within your organization have completed their enrollment, the CMD and CEO will be notified for review and signature. Please note, the Organization Admin can also request a signature for CMO and CEO. Once the CMO and CEO once the CMO and

After submitting Section A, you will see that your **ENROLLMENT STATUS** is **SUBMITTED.**

- 1. Confirm that **DETAILS ARE CORRECT**
- 2. Once the CEO page is complete, click **NEXT**
- 3. You will be directed to the SUBMISSION PAGE

Audience



Steps After Completing Section A

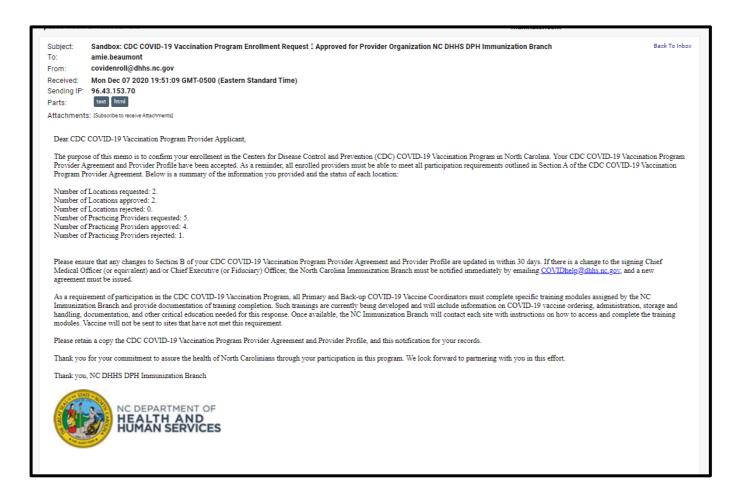


Organization Status Notification

You will receive an **EMAIL NOTIFICATION** once the status of your organization changes to **APPROVED** or

REJECTED. Rejected statuses will generate an email with the **REASON FOR REJECTION**.

Check the spam/junk folder if an email is not received. Emails will be sent from the CVMS Help Desk Portal.



Audience

Organization Administrator

Tips

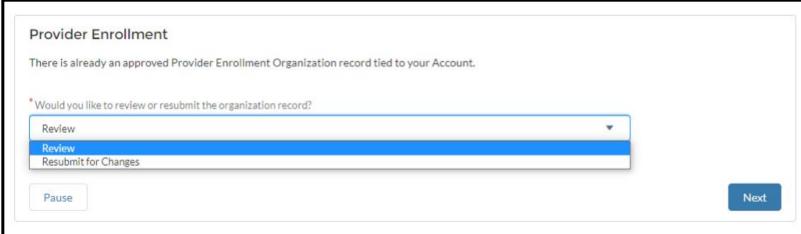
The COVIDhelp@dhhs.nc.gov email mentioned in this screenshot is now retired. Please contact the CVMS Help Desk Portal with any questions!



Update Section A After Submission

You will be able to **UPDATE SECTION A** after your organization's provider enrollment agreement has been approved. It is important to know that if you **RESUBMIT SECTION A**, your **CEO AND CMO WILL BE REQUIRED TO SIGN AGAIN** the CDC COVID-19 Vaccination Program Provider Agreement and the CDC Supplemental COVID-19 Vaccine Redistribution Agreement, if applicable. Your **ORGANIZATION** will also have to be **REAPPROVED**.

- 1. Log into the CVMS PROVIDER ENROLLMENT PORTAL
- 2. If you want to **REVIEW THE STATUS** of your Provider Enrollment Agreement, **SELECT REVIEW**
- 3. If you want to MAKE UPDATES, select RESUBMIT FOR CHANGES



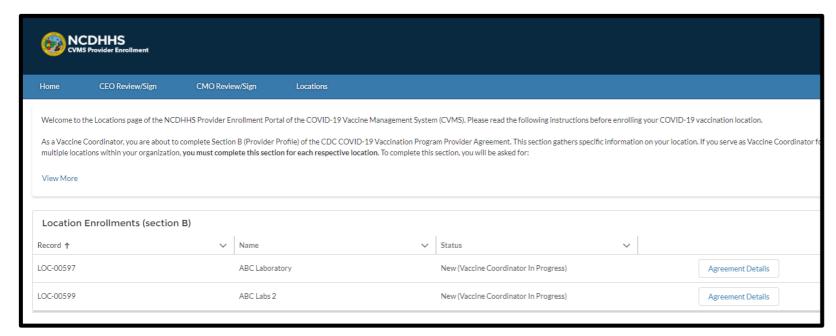




Primary Vaccine Coordinator – Section B

If you are also the **PRIMARY VACCINE COORDINATOR** for the location in your organization, you can now begin Section B of the Provider Enrollment process.

For more guidance on how to complete Section B of the Provider Enrollment Process, please review **CVMS Provider Enrollment Vaccine Coordinator User Guide,** which is located on the NC Immunization Branch website: https://immunize.nc.gov/providers/covid-19training.htm



Audience

Organization Administrator

Vaccine Coordinator

Tips

Review Slide 7 for details on activities each Role must complete in the Provider Enrollment Process.



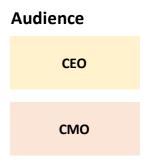
CEO & CMO – Review & Sign the CDC COVID-19 Vaccination Program Provider Agreement

If you are also the CMO and / or CEO for your organization, you can now review and sign the CDC COVID-19 Vaccination Program Provider Agreement and the CDC Supplemental COVID-19 Vaccine Redistribution Agreement, if applicable.

For more guidance on how to complete these steps, please review **CVMS Provider Enrollment Responsible Officer User Guide**, which is located on the NC Immunization Branch website:

https://immunize.nc.gov/providers/covid-19training.htm





Tips

Review Slide 7 for details on activities each Role must complete in the Provider Enrollment Process.

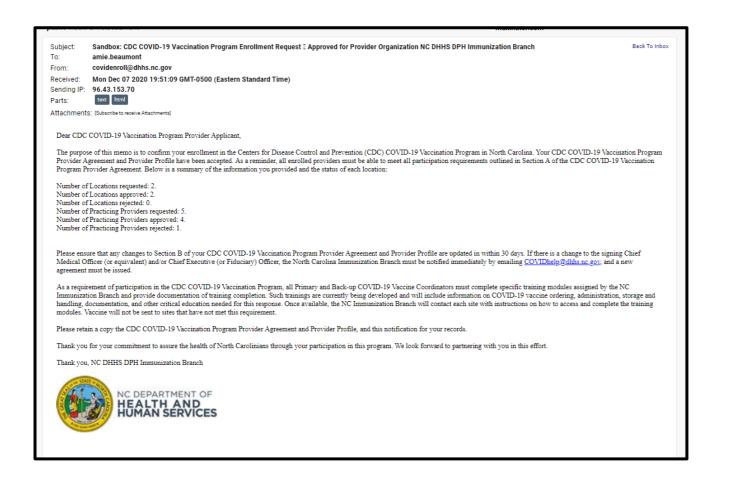


Appendix



Organization Status Notification

Your Organization Administrator, CEO, and CMO will receive an **EMAIL NOTIFICATION** once the status of your organization changes to **APPROVED** or **REJECTED**. Rejected statuses will generate an email with the **REASON FOR REJECTION**.



Audience

Organization Administrator

CEO

CMO

Tips

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Additional Notes

Key Items:

- Hyperlinks appear as light blue and will provide additional information or navigation.
- * Asterisks are used to denote required information.
- A Toggle can be clicked to see selectable options.
- A Pen can be clicked to make edits to the field.
- Previous Navigation Buttons can be clicked on to progress to the "next" or the "previous" step in a task.
- A Pause button can be clicked if you wish to step away / and return to your form later. You will be prompted to review your previously entered data upon your return/ login.

Contact Information:

All questions should be directed to the CVMS Help Desk Portal at https://ncgov.servicenowservices.com/csm_vaccine

Supported Web Browsers:

- Please use the latest version of Chrome, Firefox, Safari, or Edge Chromium browser to access CVMS.
- For more details on supported browsers, see https://help.salesforce.com/articleView?id=getstart_browsers_sfx.htm&type=5
- Note: Internet Explorer and Edge (Non-Chromium) are not supported.



User Guide Change Log

Key Items:

• Date of Change: Date that any updates were made to the User Guide

• Changes Made: Summary of the updates made within the User Guide

• Impacted Slides: Specific slides that were updated or changed

• Author: The user that made the updates to the User Guide

Version	Date of Change	Changes Made	Impacted Slides	Author
1	12/10/2020	Original version		Kevin Kauffman
2	12/31/2020	Removed link to the Provider Enrollment portal	4, 6	Simon Couderc
3	1/8/2021	 Removed any mention of the 2 CVMS Help Desk emails. Added CVMS Help Desk Portal information. 	1, 2, 8, 21, 26, 27	Courtney Seward
4	1/13/2021	 Replaced screenshots with updated Provider Enrollment Portal branding 	12, 15, 16, 23	Kechia Scott

